

Reports Module

The Reports module contains standard Web Work reports and a report writer to create customized reports using the criteria you select. This Chapter describes how to use the Web Work, Reports module.

Table of Contents

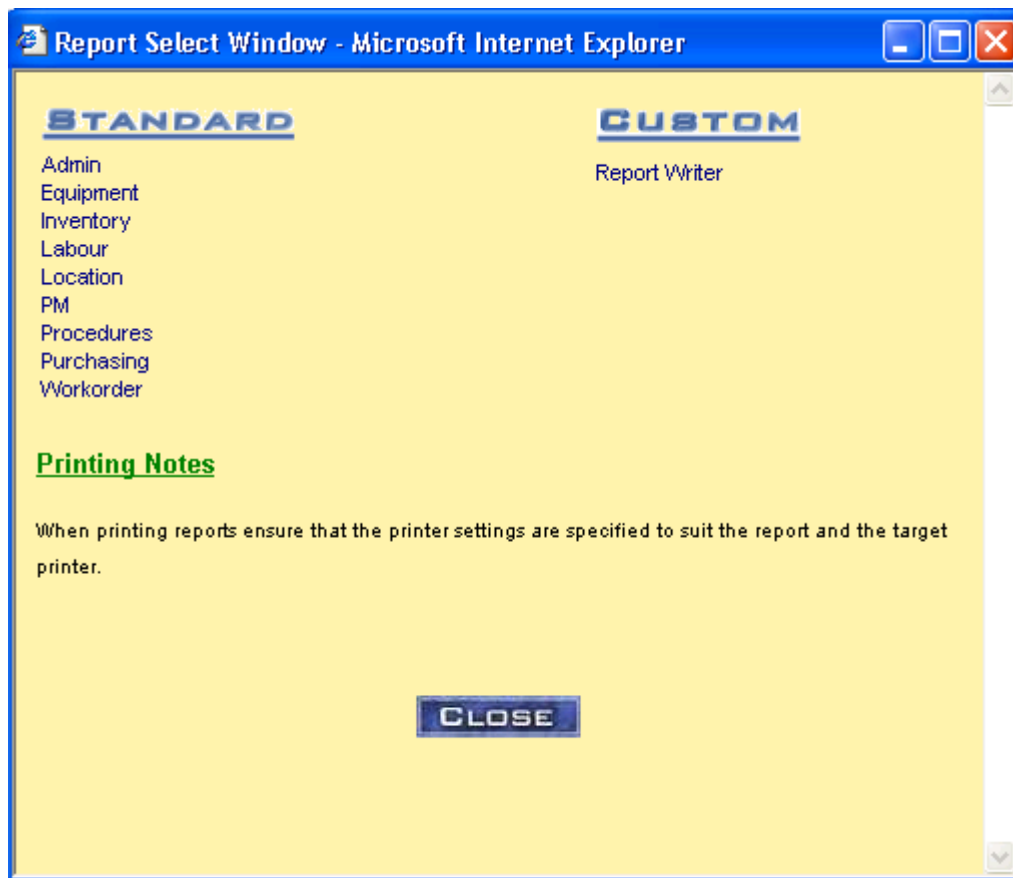
1.1	OVERVIEW OF THE REPORTS MODULE	2
2.1	VIEWING REPORTS.....	3
2.1.1.	<i>Viewing Standard Reports</i>	<i>3</i>
2.1.2.	<i>Viewing Previously Created Custom Reports.....</i>	<i>4</i>
3.1	CREATING CUSTOM REPORTS	4
3.1.1.	<i>Creating Custom Reports Using One Database Table</i>	<i>4</i>
3.1.2.	<i>Creating Custom Reports Using Two Database Tables</i>	<i>8</i>
3.1.3.	<i>Editing Custom Reports.....</i>	<i>10</i>
4.1	PRINTING REPORTS	11
4.1.1.	<i>Printing Standard Reports.....</i>	<i>11</i>
4.1.2.	<i>Printing Custom Reports</i>	<i>11</i>
5.1	ADDING YOUR LOGO TO REPORTS AND WORK ORDERS.....	12

1.1 Overview of the Reports Module

Web Work includes a number of Standard Reports for each module and also a Report Writer, which allows you to create your own reports quickly and easily.

Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.

A screen similar to the one pictured below will open:




The left hand side of the screen lists the modules, which contain standard reports. Click on any module name in the list to view a list of the standard reports for that module.

The left hand side of the screen listed under Custom is the Report Writer. Click on this link to open the custom report writer.

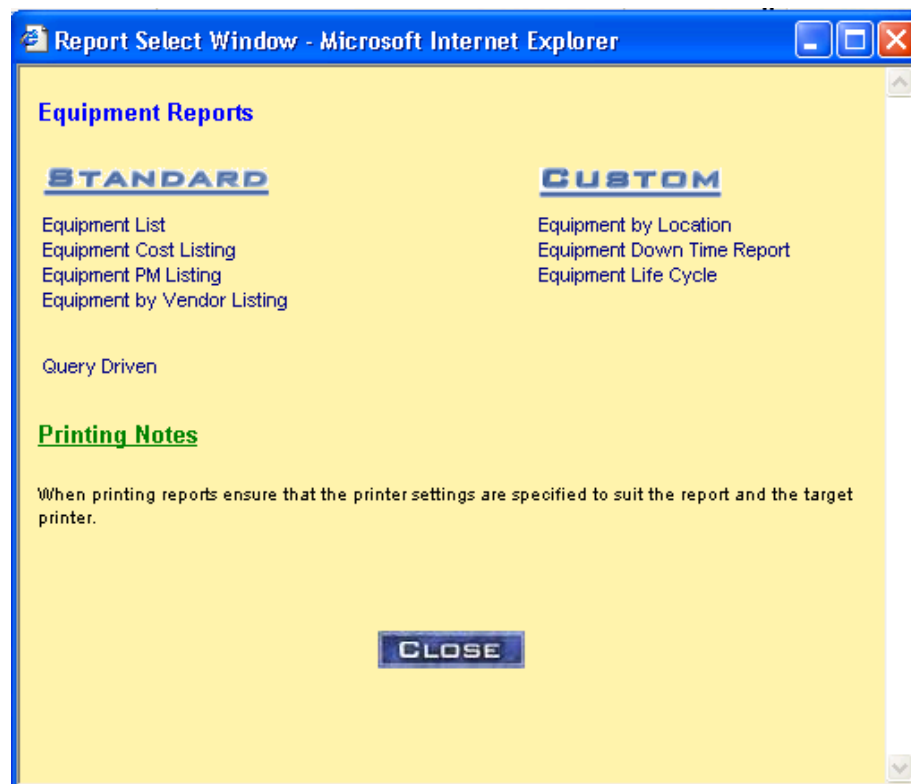
2.1 Viewing Reports

2.1.1. Viewing Standard Reports

To view standard reports:

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the applicable module listed under the heading of Standard to view a list of the standard and custom reports for that module.

The screen capture shown below shows the standard and custom reports available when clicking on the Equipment module.




The Reports listed by module are the reports that are available when you are in a particular module and select Reports from the Tools drop down menu.

- Click on the selected report to open a print preview of the report in a new browser window.
- To print the selected report click on File and select Print from the drop down menu.

2.1.2. Viewing Previously Created Custom Reports

To view previously created custom reports:

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the applicable module listed under the heading of Standard to view a list of the standard and custom reports for that module.
- Click on the selected report to open a print preview of the report in a new browser window.
- To print the selected report click on File and select Print from the drop down menu.



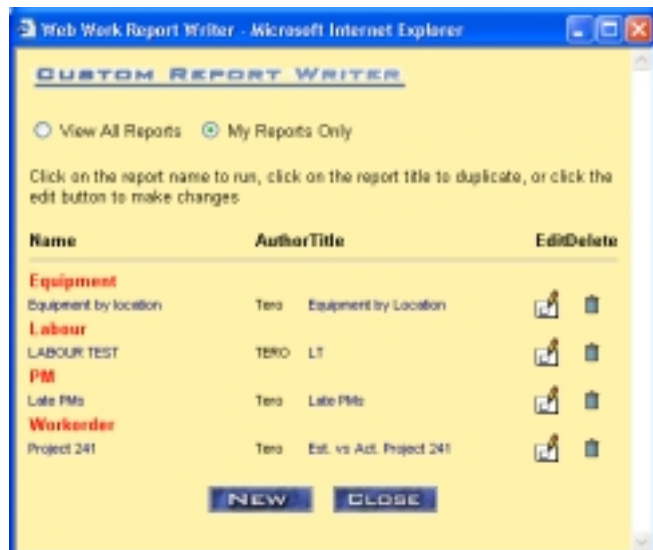
You can also view all Custom reports by opening the Reports module and selecting the Report Writer option listed under the heading of Custom.

3.1 Creating Custom Reports

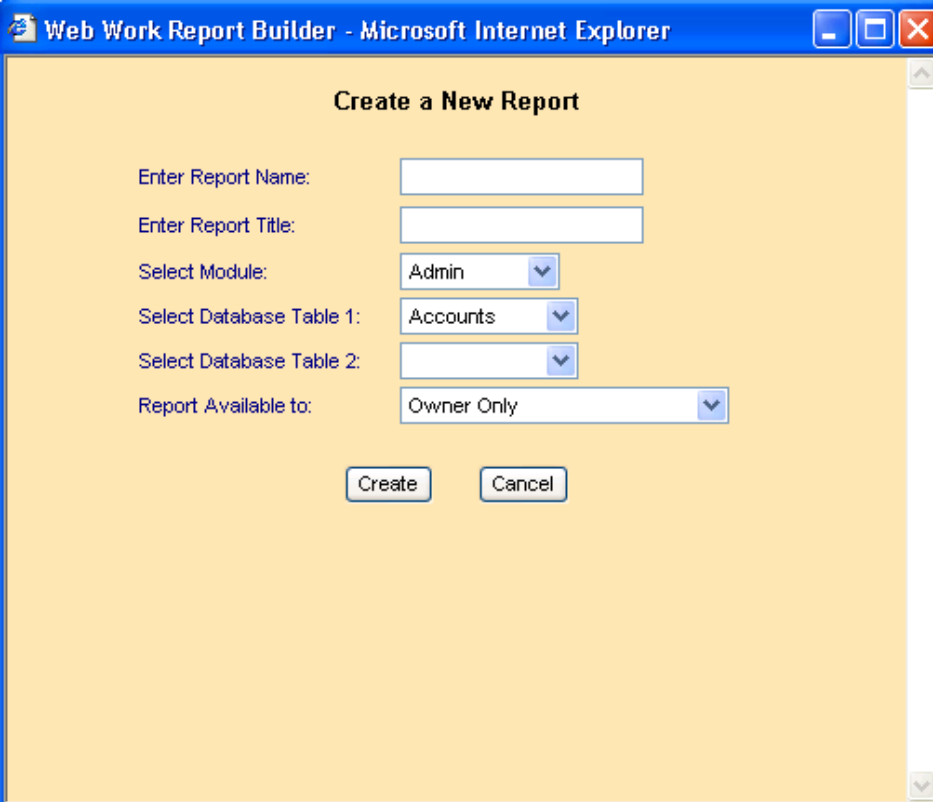
3.1.1. Creating Custom Reports Using One Database Table

To create custom reports using one database table:

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the Report Writer listed under the heading of Custom to open the custom report writer.
- Click on the **NEW** button  to create a new report.






A screen similar to the one pictured below will open:



The screenshot shows a web browser window titled "Web Work Report Builder - Microsoft Internet Explorer". Inside the browser, there is a form titled "Create a New Report". The form contains the following fields and controls:

- "Enter Report Name:" followed by a text input field.
- "Enter Report Title:" followed by a text input field.
- "Select Module:" followed by a dropdown menu with "Admin" selected.
- "Select Database Table 1:" followed by a dropdown menu with "Accounts" selected.
- "Select Database Table 2:" followed by a dropdown menu.
- "Report Available to:" followed by a dropdown menu with "Owner Only" selected.
- At the bottom, there are two buttons: "Create" and "Cancel".

- Enter a name for the new report in the applicable field.
- Enter a title for the new report in the applicable field.
- Click on the down arrow  to select the module.
- Click on the down arrow  to select Database Table 1.
- Leave the database table 2 field blank, to create a report using only one database table.
- Click on the down arrow  to select whom the report will be available to: Owner Only, Lower Level Division or Owner and Higher Level Division.
- Click on the **CREATE** button.

The Web Work report editor screen will open as pictured below:

- The report name, Title, Author, Available to and Main Table fields will be populated with the information you entered on the previous screen.
- Select the columns you wish to have in your report by clicking on the down arrow beside Add Column and selecting the column from the available list. Click on the **ADD NEW** button to add the selected column to your report.
- Continue this step until all columns you wish to add to your report have been selected.



When you click on the **ADD NEW** button, the name of the column will appear both in the table above the **ADD NEW** button and also under Preview below the **ADD NEW** button.

- The next step is to customize how you want the information you selected presented. Use the table above the **ADD NEW** button to sort how the information is presented.
- The table contains the following headings:

Label

This heading allows you to change the name of the current label for the selected column to the label of your choice.

To edit the label, click on the applicable label. This will open the Change Field Label screen.

Enter a new field label.

Click on the **SET** button to set the new label name or the **CANCEL** button to cancel this operation.

Table

The contents of this column are read-only and cannot be edited.

Field

The contents of this column are read-only and cannot be edited.

Column

The contents of this column are read-only and cannot be edited.

Up/Dn

These columns permit you to determine the order in which the selected columns appear on the report. If you click on a "u" this will move the column upwards in the table and further to the left on the report. If you click on a "d" this will move the column downward in the table and further to the right on the report.

Sort

By default the sort column will display NONE in the applicable cells. To change the order to Ascending or Descending click on the applicable cell. On first click Ascending will appear, on second click Descending will appear and on third click NONE will reappear in the cell.

Criteria

This column will be populated with any criteria selected in the Set column.

Set

The set column allows you to select only records that match the criteria you select. Click on the [...] in the applicable cell to open the Change Report Criteria screen.

The Field Name and any Current criteria will be displayed in the applicable fields.

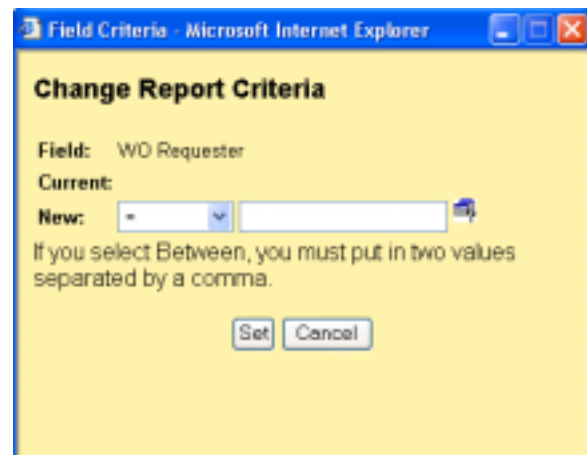
Click on the down arrow to select a criteria from the following choices: =, <>, >=, <=, <, >, Between, Like or Not Like.

If you select Between, you must enter two values separated by a comma.

Click on the **SET** button to set the new label name or the **CANCEL** button to cancel this operation.

Width

This column is populated with the size determined in the + and – columns.



+/-

Click on the + or – signs in the applicable cell to increase or decrease the width of this column.

Total

By default the total column will display NONE in the applicable cells. To add a total, click once to change the total to SUM, click a second time to change the total to COUNT or click a third time to reset the total to NONE.


Group

By default Group is set to N. To set the information in this column to group, click once to change the N to Y or click again to reset this column to N.

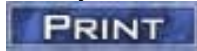
Visible

By default Visible is set to Y. To hide the information in this column click once to change the Y to N or click again to reset this column to Y.


Delete

To delete this column from your report click on the .

- Once you have customized the way you want your report to appear, click on the **PRINT** button



to open the report in print preview mode.



If you are satisfied with the way the report is presented, click on File and select Print from the drop down menu to print the report or click on the  to close the print preview and return to the Report Editor screen.



When printing reports ensure the printer settings are set up correctly for your report and printer.

3.1.2. Creating Custom Reports Using Two Database Tables

To create a custom report using two database tables:

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the Report Writer listed under the heading of Custom to open the custom report writer.
- Click on the **NEW** button  to create a new report.

- Enter a name for the new report in the applicable field.
- Enter a title for the new report in the applicable field.
- Click on the down arrow ▼ to select the module.
- Click on the down arrow ▼ to select Database Table 1.
- Click on the down arrow ▼ to select Database Table 2.
- Click on the down arrow ▼ to select whom the report will be available to: Owner Only, Lower Level Division or Owner and Higher Level Division.
- Click on the **CREATE** button.

A screen similar to the one pictured below will open:

- The report name, Title, Author, Available to and Main Table fields will be populated with the information you entered on the previous screen.
- Select the columns from table 1 you wish to have in your report by clicking on the down arrow beside Add Column and selecting the column from the available list. Click on the **ADD NEW** button to add the selected column to your report.
- Continue this step until all columns you wish to add to your report have been selected.

- Repeat this step for table 2.



When you click on the **ADD NEW** button, the name of the column will appear both in the table above the **ADD NEW** button and also under Preview below the **ADD NEW** button.

- The next step is to customize how you want the information you selected presented. Use the table above the **ADD NEW** button to sort how the information is presented.
- Set the Field Label, Up/Down, Sort, Criteria, Set, Width, +/-, Total, Group, Visible and Delete by clicking on the applicable cell. For details about these setting see the applicable setting in the Creating Reports using one Database Table section of this manual above.
- Set the Join Type:
 - Only Matching records from two tables: only records that are in the first table and also the Second table.
 - All Records from the first table and matching records from the second table: all records which meet the applicable criteria from table one and any matching records from table 2
 - All Records from the second table and matching records from the first table: all records, which meet the applicable criteria from, table two and any matching records from table 1.

Click on the **CREATE LINK** button




to set the join type you selected.

- Once you have customized the way you want your report to appear, click on the **PRINT** button



to open the report in print preview mode.


If you are satisfied with the way the report is presented, click on File and select Print from the drop down menu to print the report or click on the  to close the print preview and return to the Report Editor screen.






When printing reports ensure the printer settings are set up correctly for your report and printer.

3.1.3. Editing Custom Reports

1. Click on the **EDIT** button to edit the report. For more information about editing reports see Creating Custom Reports further on in this manual.

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the Report Writer listed under the heading of Custom to open the custom report writer.

- Click on the **RADIO** button  beside View All Reports or My Report Only to select which reports you wish to view.


 View All Reports  My Reports Only

- Click on the **EDIT** button  beside the report you wish to edit.

This will open the report you selected in Report Editor mode.

- Make any applicable changes.


- Click on the **PRINT** button  to open the report in print preview mode.


If you are satisfied with the way the report is presented, click on File and select Print from the drop down menu to print the report or click on the  to close the print preview and return to the Report Editor screen.

4.1 Printing Reports

4.1.1. Printing Standard Reports

To print a standard report that has already been created:


- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the applicable module listed under the heading of Standard to view a list of the standard and custom reports for that module.
- Click on the selected report to open a print preview of the report in a new browser window.


Click on File and select Print from the drop down menu to print the report or click on the  to close the print preview screen.

4.1.2. Printing Custom Reports

To print a custom report that has already been created:

- Click on the **REPORTS** module  button on the left hand side of the screen to access the Reports module.
- Click on the Report Writer listed under the heading of Custom to view a list of the custom reports sorted by module.

- Click on the **RADIO** button  beside View All Reports or My Report Only to select which reports you wish to view.
- Click on the selected report to open a print preview of the report in a new browser window.

Click on File and select Print from the drop down menu to print the report or click on the  to close the print preview screen.



To add your corporate logo to your reports see Adding Logos below.

To email this report - Print it to the screen and then select File, Send, Page by Email, which will open a new message in your default email program with this report as an attachment.

5.1 Adding Your Logo to Reports and Work Orders

The default logo for all reports in the Web Work system is the Web Work logo.

To change this to your company's logo follow these steps:

- Create a logo that is a maximum of 200 pixels wide by 100 pixels high.
- Ensure the logo is in GIF format
- Name the logfile: logo.gif
- Copy the logo into the webwork/images directory.